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Weekly Market Update

Sep 21, 2026 –Sep 25, 2026

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE 150 Midcap	BSE 250 Smallcap
Sep 25, 2026	73895	23140	16574	7145
Sep 18, 2026	74294	23346	16859	7202
1 Week change (%)	-0.54	-0.88	-1.69	-0.79
1 Month change (%)	-3.95	-3.94	-4.43	-1.00
YTD Change (%)	-13.26	-11.50	0.89	7.18

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Sep 25, 2026	62833	51596	27143	59648	17375	41357
Sep 18, 2026	63516	51438	27612	60198	17199	41215
1 Week change (%)	-1.07	0.31	-1.70	-0.91	1.02	0.34
1 Month change (%)	-3.55	1.37	-7.96	-6.58	-2.40	-3.06
YTD Change (%)	-5.88	17.79	-26.11	-5.54	-11.99	11.43

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	19.62	19.56	28.06	33.51
P/B	3.99	2.80	4.17	3.43
Dividend yield	1.12	1.22	0.59	0.57

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Sep 25, 2026	-3693.93	2838.17
MTD-Sep 2026	-18530.97	52616.83
YTD (2026)	-377585.63	616121.39

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Sep 24, 2026
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.09%
10 Year Gilt	7.11%

Debt indicators (%)	Sep 24, 2026
3 Month CD rate	6.10%
1 year CD rate	7.54%
3 Month CP rate	6.15%
5 Year Corp bond	7.67%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	4.82% (Aug-2026)
WPI	9.92% (Aug-2026)
GDP growth rate	7.80% (Jun 2026)
IIP	6.70% (Jul-2026)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Sep 25, 2026	51828	10695	66364	24510
Sep 18, 2026	51682	10659	65018	24750
1 Week change (%)	0.28	0.34	2.07	-0.97
1 Month change (%)	-3.25	-0.90	0.35	-4.13
YTD Change (%)	7.12	7.48	28.04	-6.94

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Sep 25, 2026	97.44	151377	231793
Sep 18, 2026	103.19	153176	237062
1 Week Change (%)	-5.57	-1.17	-2.22
1 Month Change (%)	20.42	-6.15	-4.17
YTD Change (%)	37.84	14.13	1.02

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Sep 25, 2026	95.81	126.95	109.15	60.92
Sep 18, 2026	95.95	128.53	110.21	61.17
1 Week Change (%)	-0.15	-1.23	-0.96	-0.41
1 Month Change (%)	0.07	-2.77	-2.30	1.25
YTD Change (%)	6.62	4.96	3.49	6.17

NEWS SUMMARY

NEWS SUMMARY

- The Indian equity indices ended the week lower and remained largely range-bound during the week. The elevated crude oil prices, higher US Treasury yields and geopolitical uncertainty remained key factors weighing on sentiment. For the week, The Nifty 50 fell 0.88%, while the Sensex declined 0.54%. The broader market indices, BSE 150 Midcap and BSE 250 Smallcap declined by 1.69% and 0.79%. On the BSE sectoral front, it was mixed. BSE FMCG was the major gainer, up 1.02%, followed by Metal, up 0.34%. BSE IT was the major loser, down 1.70%, followed by Bankex, down 1.07% and Auto, down 0.91%.

- Looking ahead, Indian markets are heading into a shortened trading week with investors watching a mix of geopolitical tensions, oil prices, movements in global bond markets and fresh economic data for clues about the market's next direction, analysts said. Investors will closely track the course of US-Iran talks, with particular attention to signs of progress toward restoring traffic through the Strait of Hormuz. On the domestic front, investors will track August industrial production data and the HSBC manufacturing Purchasing Managers' Index, along with foreign institutional investor flows and monthly automobile sales figures.

- According to the Asian Development Bank, India’s GDP growth forecast for FY27 has been raised to 7.0% from 6.6%, supported by strong public investment, resilient services and electronics exports, and stronger-than expected economic growth in the June quarter. However, the FY28 growth forecast was trimmed to 7.1% from 7.3% due to a higher base effect.

- India's net direct tax collections rose 13% YoY to Rs. 12.1 lakh crore as of Sep 17, 2026, driven by healthy growth in both corporate and personal income tax collections, reflecting continued strength in economic activity and tax compliance.

NEWS SUMMARY

- The National Highways Authority of India has issued new guidelines for planning and designing high-speed access-controlled national highways to improve road safety, operational efficiency and uniformity in project standards. The norms will apply to upcoming four- and six-lane greenfield and brownfield corridors, supporting India's plan to develop 50,000 km of such highways by 2047.

- Bond yields surged, tracking a sharp rise in U.S. Treasury yields and crude oil prices, both of which reinforced expectations of a hawkish RBI stance and increased the likelihood of a rate hike at the Oct 2026 monetary policy meeting. Yield on the 10-year benchmark paper (6.94% GS 2036) rose by 5 bps to close at 7.12% as compared to the previous week's close of 7.07%.

- According to the Ministry of Commerce & Industry, the Index of Core Industries (ICI) rose 4.8% YoY in Aug 2026, following a downwardly revised growth of 5.0% YoY in Jul 2026. Cement recorded the strongest growth at 12.5%, followed by electricity and iron ore, which grew 11.6% and 5.5%, respectively. In contrast, fertilizers and natural gas contracted by 12.4% and 4.9%, respectively.

- According to data from the Petroleum Planning and Analysis Cell, India's crude oil import bill surged 48.4% YoY to $74.8 billion during Apr-Aug FY27, driven by higher international crude prices despite a marginal 0.4% decline in import volumes.

- India requires Rs 168-172 trillion in infrastructure investment through FY31; however, projects worth Rs 78-80 trillion have yet to enter the announced project pipeline, according to a NaBFID-BCG report. With a significant portion of future demand expected to come from urban infrastructure and greenfield projects, the report highlighted the need for stronger project preparation, viable revenue models, and greater private sector participation.

NEWS SUMMARY

- The government's Rs 23,731-crore GOBARdhan scheme aims to provide India's CBG industry with a more predictable business model through assured offtake, government-backed pricing for at least 10 years, and capital support.

- Asian equity markets mostly declined as rising oil prices and surging U.S. bond yields fuelled inflation concerns and strengthened expectations of further interest rate hikes.

- The US markets, Gains in the S&P 500 and Nasdaq capped a volatile week driven by uncertainty about what industries will win and lose from artificial intelligence, and by concerns about the US war with Iran and a surge in US Treasury yields. The S&P 500 gained 1.2% for the week, while the Nasdaq rose 2% for the week.

- European shares snapped a three-week losing streak as oil prices retreated for most of the week, although investors remained cautious about developments in the Middle East and surging bond yields. The pan-European STOXX 600, adding to the week's 0.5% advance.

- Bank of Japan raised its benchmark interest rate from 1.0% to 1.25%, the highest level since 1995, in a 7-2 vote. The hike aims to curb inflation risks and continue Japan's shift away from decades of ultra-loose monetary policy. Rising prices, a weak yen, and concerns about inflation exceeding the BOJ's 2% target were key drivers behind the decision.

- The Bank of England kept its benchmark interest rate unchanged at 3.75%, marking the sixth consecutive meeting without a rate change. Policymakers voted 6-3 to hold rates, although some members favored an immediate hike due to rising inflation risks.

NEWS SUMMARY

- Japan's manufacturing PMI came in at 54.1 in Sep 2026 down from 54.9 in Aug 2026, according to latest survey from S&P Global.
- Eurozone's flash composite output index advanced to 53.1 in Sep 2026 from 52.0 in Aug 2026, as per survey data from S&P Global. Eurozone's private sector grew at its strongest pace since Apr 2023, supported by robust expansion in both the services and manufacturing sectors.
- Gold prices declined due to strong U.S. dollar, higher bond yields, and expectations of further rate hikes by the U.S. Fed.
- The Indian rupee in spot trade rose against the U.S. dollar supported by lower crude oil prices and RBI intervention in the currency market.
- Brent crude oil prices fell as hopes for a diplomatic resolution to the U.S.- Iran conflict increased after the United Nations General Assembly.

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